

Worldsource Wealth Management and Coast Capital extend long-term partnership with new 10-year agreement

MARKHAM, Ontario, October 26, 2022 – Worldsource Wealth Management Inc. (Worldsource), a subsidiary of Guardian Capital Group Limited (Guardian), announced today that it had extended its 14-year partnership with Coast Capital for another decade. The extension will see an expansion of Coast Capital’s relationship with Guardian, through new initiatives with IDC Worldsource Insurance Network and Guardian Capital LP’s (Guardian Capital) Canadian Retail Asset Management business.

“Both Worldsource and Coast Capital believe the future of wealth management will be focused on services and solutions that better align with investors’ values and goals,” said Doce Tomic, President and Chairman, Worldsource. “Along with that value-alignment, Canadians depend on trusted partners who can help them streamline and simplify the wealth journey in a complex environment. The extension of our long-standing partnership positions both to help members achieve these goals together.”

Over the years, the partnership between the two organizations has led to multiple developments, including the launch of Coast Capital’s suite of Sustainable Funds in January of this year. As part of Coast Capital’s move to enhancing sustainable investing, these funds, designed by Worldsource’s parent company Guardian, offer easy-to-use investment solutions rooted in helping Coast Capital members invest in a better world. Each Sustainable Fund has a critical focus on environmental, social, and governance (ESG) factors, allowing users to practice responsible investing while leveraging Guardian’s decades of leadership in institutional asset management.

“As a social purpose organization, we are committed to building better futures for our members, employees and broader communities,” said Catherine Wood, Coast Capital’s Chief Strategy, Product and Marketing Officer. “As part of that commitment, we strive to leverage our relationships with partners to come together as one unified team, connected by both common purpose and a shared responsibility for outcomes. Working with trusted partners, like Worldsource, enables us to drive creative solutions that bring value to all of our stakeholders.”

The benefits of this long-term relationship go beyond simply a competitive offering, allowing Coast Capital to deliver tailored wealth management solutions to its members, leveraging Worldsource’s open dealer platform. Ultimately this allows Coast Capital to deliver a differentiated experience built on a foundation of trusted advice that drives real impact for its members in reaching their financial goals.

About Worldsource Wealth Management

Worldsource Wealth Management Inc. (WWM) is a fully integrated wealth management company focused on building financial prosperity, and a wholly owned subsidiary of Guardian Capital Group Limited, a diversified financial services company founded in 1962. It is comprised of: Worldsource Financial Management Inc. (WFM), an independent mutual fund dealer regulated by the Mutual Funds Dealer Association of Canada (MFDA); Worldsource Securities Inc. (WSI), a full-service investment dealer and a Member of the Investment Industry Regulatory Organization of Canada (IIROC) and CIPF (Canadian Investor Protection Fund); and IDC Worldsource Insurance Network Inc. (IDC WIN), one of Canada’s largest life insurance managing general agencies.

For more information about Worldsource Wealth Management, please visit: worldsourcewealth.com.

About Coast Capital

At Coast Capital, we're not dreaming about a better future, we're building one. We're a member-owned financial cooperative with an 80-year legacy of unlocking financial opportunities that positively impact people and communities. It's our belief that every Canadian deserves a financial partner who actually cares how things turn out. Driven by our social purpose, we look at everything we do through the lens of how we can help our 600,000 members, our employees and communities. A proud Certified B Corporation®, we're part of a global movement building a more inclusive, equitable and regenerative economic system.

Each year, we invest 10% of our bottom line into our communities—totaling almost \$91M since 2000. We're deeply committed to making our financial cooperative a great place to work as demonstrated by some of our accolades. Coast Capital is a platinum member of Canada's Best Managed Companies, one of Canada's Most Admired Corporate Cultures, and a B.C. Top Employer and Canada's largest federal financial cooperative by membership; we have been recognized for our work in the Social Purpose space in the first-ever Social Purpose Ranking by Canadian media and research firm, Corporate Knights. To learn more, visit us online at coastcapitalsavings.com.

For media inquiries:

Guardian Capital Group Limited
Angela Shim
(416) 947-8009
AShim@guardiancapital.com
guardiancapital.com

Coast Capital
media@coastcapitalsavings.com
(778) 391-6225